

TOWN OF MYERSVILLE

TOWN HALL
301 Main Street
P.O. Box 295
Myersville, MD 21773
(301) 293-4281

Wayne S. Creadick, Jr., Mayor
Bradford Dyjak,
Planning & Zoning Administrator



Request for Proposals (RFP) – Solar Thermal Systems

Date of Issue: February 13, 2013
Proposal Due Date: March 12, 2013 at 3:00 PM
Issued by: Town of Myersville Mayor & Council
RFP Point of Contact: Bradford Dyjak, Planning & Zoning Administrator
Myersville Town Hall
(301) 293-4281
BDyjak@myersville.org

SOLARIZE FREDERICK COUNTY: REQUEST FOR PROPOSALS FOR THE INSTALLATION OF SOLAR HOTWATER (THERMAL) SYSTEMS

INVITATION FOR PROPOSALS

Notice is hereby given that proposals are invited and will be received for Professional Suppliers and Installers related to the installation of residential solar hot water systems, also known as solar thermal systems, through the Solarize Frederick County Program. The program consists of services to design, procure and install new, residential, direct-owned solar hot water systems for a cohort of Frederick County homeowners based upon the scope of work contained in this Request For Proposal. The intent is to select one Installer (or more than one Installer, if necessary) to exclusively provide services for this program.

The Request for Proposals document may be obtained by email (BDyjak@myersville.org) or downloaded from the Town website www.Myersville.org or the Solarize Frederick County web pages at www.FrederickCountyMD.gov/Greenhomes. Sealed proposals must be submitted to no later than **March 12, 2013 at 3:00 PM** to:

Town of Myersville Planning Office
Attention – Bradford Dyjak
Solarize Thermal Bid
P.O. Box 295
Myersville, MD 21773

For questions or more information, contact Bradford Dyjak, Myersville Planning and Zoning Administrator, (301) 293-4281, BDyjak@Myersville.org.

ANTICIPATED PROJECT TIME LINE

Action	Date	Time
RFP Announced	February 13, 2013	
Pre-Submittal Meeting - Myersville Town Hall	February 25, 2013	3PM
Proposal questions due	February 26, 2013	2PM
Responses to Proposal questions distributed	March 5, 2013	10AM
Proposals Due , proposal opening - Myersville Town Hall	March 12, 2013	3PM
Interviews*	TBD	
Notice of intent to award contract	April 10, 2013	
Execution of MOU	April 17, 2013	
Participant list available	TBD	
Installations completed	December 31, 2013	

Dates are approximate and are subject to change.

*The need for interviews will be determined by Solarize Frederick County's RFP Committee

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SCOPE OF WORK

INTRODUCTION

The Town of Myersville, in partnership with the Frederick County Office of Sustainability and Environmental Resources, the Villages of Urbana, and other project partners is undertaking a community “solarization” project known as Solarize Frederick County. We are hereby soliciting requests for proposals to promote, design and install a number of residential solar thermal renewable energy systems in Frederick County in 2013 in a streamlined, cost-efficient manner.

Installers may use this outline as a guide for organizing a scope of work for their proposal, but are encouraged to expand upon, refine or suggest alternative approaches based on previous experiences with similar projects.

GENERAL SCOPE OF WORK

The purpose of this pilot project is to help Frederick County homeowners, and in particular, residents of the Town of Myersville and the Villages of Urbana, come together to purchase and install solar hot water systems as a community, and save significant costs as a result of bulk purchasing and a limited number of Frederick County Solar Incentive Grants.

Solarize Frederick County will contract with one Installer (or more Installers if necessary) to provide promotional services, education, site assessment, design, equipment procurement, installation services, and financing options for homeowners that choose to participate. The selected Installer(s) will provide a single fixed pricing structure for all participants, depending on total capacity of the project.

Staff and volunteers associated with the Solarize Frederick County pilot project, the Frederick County Green Homes Challenge, the Town of Myersville, and the Villages of Urbana will actively market this collective purchasing initiative to homeowners in their respective communities, which were selected by OSER for this pilot project. OSER will also market the Solarize initiative to the Frederick County community at large. During the months of March through July 2013, Solarize Frederick County will deliver educational workshops called Solarize 101 and Solarize 201. The selected Installer(s) is/are expected to have staff available to answer questions and provide an interface to the community at Solarize 201 workshops. Other neighborhood outreach opportunities may be created that selected Installer(s) can participate in if they wish.

The names of interested homeowners registered for a home assessment will be provided to the selected Installer(s) as they come in to the Solarize Frederick County database. If more than one Installer is selected, Solarize Frederick County will refer property owners to the Installers equitably. The selected Installer(s) will provide site assessments and system design proposals for each property owner on the list at no cost, contract directly with property owners, and finalize the installation cost for each home or business. Site assessments will include an analysis of the impact of shading, tilt and orientation on annual hot water production, and note any electrical, plumbing, mechanical or structural considerations that may incur costs above the pricing schedule for the project. Individual system designs should be aesthetically pleasing, taking into consideration the preferences of a given homeowner, while minimizing project costs and maximizing solar thermal production.

The installations will be carried out by the selected Installer(s) in conformance with all applicable Maryland and Frederick County laws, codes, building permits, and existing rules and timelines, as appropriate. The system installed must conform to requirements for the [Maryland Residential Clean Energy Grant Program](#) and the [Federal Residential Renewable Energy Tax Credit](#), and Frederick County Solar Incentive Grants.

For each participating home, the selected Installer(s) will be responsible for securing all required permits; and, as appropriate, scheduling and passing all jurisdictional inspections. The selected Installer(s) will provide each property owner that acquires a solar thermal system with an operating manual, and all other necessary information and documentation. The Installer(s) will also provide each property owner appropriate documentation and guidance for applying for the Maryland Residential Clean Energy Grant Program and the federal energy tax credit. The Installer(s) will incorporate any awarded Frederick County Solar Incentive Grants as a deduction into the contract with the homeowner, and submit an invoice along with appropriate grant forms and documentation, to the Frederick County Office of Sustainability and Environmental Resources for reimbursement.

Once the Installer is selected, the sole duty of the participating TOM and VOU communities will be to promote and publicize the program and engage and educate residents through Solarize workshops and other chosen activities. The communities will have no contractual involvement with the selected Installer, or residents who contract with the Installer.

SERVICES TO BE PROVIDED BY SOLARIZE FREDERICK COUNTY

Solarize Frederick County will provide the following:

- A Solarize Project Manager who will provide timely responses to any installer or homeowner inquiries, and be reasonably available for any meetings.
- Marketing services including publicizing the project at local events and presentations, and promotion via newsletters, bulletins, press releases, social media, flyers, and other media outlets.
- Lead generation for the selected Installers.
- Coordination between the selected Installer or Installers and participating property owners.
- An online database to coordinate job and incentive grant processing.
- Approximately 30 incentive grants for solar thermal installations:
 - \$1,000 for homeowners who are certified as Power Savers at the time of contract signing, or
 - \$750 for homeowners who are not certified Power Savers.
- Solarize Frederick County workshop development, presenter coordination, scheduling, and delivery. Workshop topics will range from solar project basics to topical sessions on technical nuts and bolts, incentives and tax credits, and financing options.
- Coordination with Frederick County's Power Saver Challenge.

Solarize Frederick County will publicize the project at local events and presentations, and via newsletters, bulletins, press releases, social media, flyers, and other media outlets.

PROPOSAL PROCESS

The proposal process is as follows:

1. Any party interested in a request for proposal document may request a copy, free of charge, from the **Town of Myersville**, Bradford Dyjak, Planning and Zoning Administrator, P.O. Box 295, Myersville, MD 21773, (301) 293-4281, BDyjak@myersville.org.
2. Any addenda will be e-mailed to the address provided by the Installer.
3. The request will be made available online at www.Myersville.org, www.FrederickCountyMD.gov/GreenHomes or will be emailed upon request.
4. Solarize Frederick County will also publicly advertise this request for proposal.
5. An optional pre-submittal conference with Installers will be held at 3 PM on February 25, 2013 at the Town Hall in Myersville, 301 Main Street.
6. Installers may contact Bradford Dyjak (BDyjak@myersville.org) in writing with any questions or requests for additional information needed to submit a proposal. Clearly state in the subject line of any email "Solarize RFP Question/Clarification." **The deadline for submitting such questions/clarifications is 4 PM on February 26, 2013.**
7. Written answers to all questions will be posted on the Solarize Frederick County web page under the FAQ section for installers. An addendum will be issued on March 5, 2013 to all recorded holders of the RFP if a substantive clarification is in order. No questions or clarification will be given over the phone.
8. Proposals must be submitted by mail and must include five hard copies of the proposal as well as one digital copy (via CD or other electronic media), and shall be delivered as **Solarize Thermal Bid , ATTN: Bradford Dyjak, Planning & Zoning Administrator, Town of Myersville, P.O. Box 295, Myersville, MD 21773. Faxed or emailed proposals and late proposals will not be accepted.**
9. The proposal must be signed. Submission of a signed proposal will be interpreted to mean that Installer has hereby agreed to all terms and conditions set forth in all of the sheets which make up this solicitation document.
10. Proposals will be opened at **3PM on March 12, 2013** at Myersville Town Hall.
11. All proposals and documentation submitted becomes the property of the TOM, OSER, and the Solarize project team.
12. At any time prior to the due date for the submission of proposals, an Installer may request to modify or withdraw the proposal according to the guidelines set in this proposal.
13. In order to maintain the fairness and integrity of the selection process, proposals must conform to the requirements of this RFP. All communications shall be through the contact named on the front cover of this RFP. Communication with Project managers or supporting community partners for the purpose of unfairly influencing the outcome of this RFP may be cause for the Installer's proposal to be rejected and disqualified from further consideration.

Modification

The Installer may submit a written modification in accordance with the instructions for submitting a proposal as identified in this request for proposals. Any modification is required to have a date and time placed on it by the Installer, and the words "This modification amends and supersedes the prior offer" written on the modification.

Withdrawal

An Installer may request to withdraw a proposal by filing such request in writing, on the letterhead of the Installer, signed by a person authorized to do so. Alternatively, the Installer may request to have a proposal withdrawn by making the request in person, producing appropriate identification and evidence that the person is authorized to withdraw the offer. The Purchasing Agent will void the time and date stamp on the offer envelope and return the proposal to the Installer unopened.

A withdrawal will not preclude the submission of another proposal by the Installer prior to the time and date set for the opening proposals.

Proposal Selection

The evaluation committee shall assign points to each Installer proposal. Scores may range from a minimum of zero to a maximum of 100 points. A Proposal's score will be used as part of the criteria to rank proposals.

1. Following the proposal opening, the Solarize RFP Committee will review the proposals submitted for completeness and compliance with the proposal requirements. All proposals shall be evaluated based on the criteria identified in section titled "Form of Proposal and Evaluation Criteria". TOM reserves the right to waive irregularities and minor informalities if it is in the public interest to do so.
2. TOM may invite the top ranked Installers to make a brief oral presentation and/or be interviewed by the evaluation team. Criteria for oral interviews will be provided upon invitation. Interviews are expected to take place between March 25 and April 2, 2013.
3. After evaluation of proposals and any interviews, the Solarize RFP Committee shall submit its evaluations and recommendation to the TOM Mayor & Council for selection. It is anticipated that the Mayor & Council will consider selection during its April 10, 2013 regular Town meeting. Following this selection, TOM will send a letter to all Installers that have submitted proposals stating TOM's intent to award the contract to the selected Installer(s).

Conclusions & Reservations

1. TOM reserves the right to cancel this request for proposals and/or reject all proposals if it is in the best interest of the public to do so. If TOM cancels this request for proposals after proposals have been submitted, the proposals will be returned, but the committee will keep a list of the proposals received.
2. TOM reserves the right to reject the offer of any Installer who fails to complete on time the Solarize Frederick County Memorandum of Understanding (to be provided upon Installer selection), or to reject the offer of any Installer who is not in a position to perform such an agreement satisfactorily as determined by TOM and the RFP Committee.

3. TOM reserves the right to accept the offers and award a contract to a responsible Installer, to postpone the acceptance of the offer and the award of the contract for a period not to exceed thirty (30) calendar days, or to reject any and all offers received and further advertise the project for offers.
4. TOM may reject any offer not in compliance with all prescribed public purchasing procedures and requirements, and may reject for good cause any or all offers if it finds it is in the public interest to do so.
5. Costs for developing the proposal, including travel, mileage, printing and per diem, are entirely the responsibility of the Installer.
6. TOM reserves the right to select a second installer at a later date at negotiated rates should demand warrant.
7. TOM reserves the right to seek clarification of each proposal.

CONTRACT REQUIREMENTS

All Installers must accept the terms included with this Request for Proposals as part of the Memorandum of Understanding. TOM reserves the right to negotiate a final Memorandum of Understanding that is in the best interest of the public.

FORM OF PROPOSAL AND EVALUATION CRITERIA

Please create project proposals in 8-1/2" x 11" document size using a minimum 11-point font size. Proposals shall not exceed 20 pages, excluding Section 10: Supporting Documentation. Proposals shall be in accordance with the requirements stipulated in this request, and will be evaluated and scored based on the following weighted criteria:

Section 1: Cover letter (0 points)

Section 1 shall be a signed cover letter stating the highlights, key features and distinguishing points of the Proposal. Include the name and address of the organization submitting the proposal, together with the name, address and telephone numbers of the contact person who will be authorized to make representations for the organization, the Installer's federal tax identification number, the North American Board of Certified Energy Practitioners (NABCEP) certification number of any employees, and a list of local subcontractors, if any. The cover letter shall include a statement that the proposal is valid for sixty (60) days after receipt.

Section 2: Table of Contents (0 points)

Section 2 shall be a detailed Table of Contents and shall include an outline of the submittal identified by sequential page number and by section reference number and section title as described herein.

Section 3: Proposing Installer Profile (15 points)

This section shall include a brief description of the Installer's size and Installer's local organizational structure. Include a discussion of the Installer's history, financial stability, capacity and resources. This section should also address the ratio of part time to full time employees and the Installer's health and safety record and practices.

Experience: Describe the demonstrated experience of the Installer in developing, designing and installing residential or small business scale solar hot water systems, and if applicable, on a community-wide scale. Discuss how experience on previous projects relates to the Solarize Frederick County project. As part of this discussion, list any recent similar installations by size and location. Provide three references as part of Section 10: Supporting Documentation.

Financial Stability: Include a discussion of the Installer's financial stability, capacity and resources. Include the company's most recent financial statement as an attachment in Section 10: Supporting Documentation.

Equipment: List the equipment and vehicles owned by the Installer that are necessary for assessments and installation.

Licensing and Requirements: Provide documentation that the Installer, as well as its contract forms, comply with the requirements of the Maryland Department of Labor, Licensing and Regulation's Division of Occupational and Professional Licensing.

Provide proof of licensing with the Maryland Home Improvement Commission and provide your Installer's MHIC number. Furthermore, a statement should be included that the Installer understands that it is the contractor's obligation to ensure that all sub-contractors hired by the contractor are licensed by the Maryland Home Improvement Commission, regardless of the amount of their subcontract, prior to engaging their services.

Provide evidence that the Installer uses plumbers licensed by the State of Maryland and Frederick County.

Provide evidence that the Installer uses electricians certified either by the State of Maryland or Frederick County. Attach a sample contract as part of the Appendix.

Lawsuit Disclosure: Please identify any legal cases in which the Installer is currently, or has been, involved with as a party in the past five years (excluding those that involve collections). Please state whether and how past cases were resolved. Discuss how any lawsuits may, or may not, impact the implementation of this Solarize Frederick County initiative.

Section 4: Qualifications of the project team (10 points)

Section 4 shall identify the key project team members by name and position, and provide qualifications and experience. Address skill sets in roofing, electrical, plumbing and solar work. Provide names, addresses, contact information, and contractor license numbers for all specified subcontractors as well as Installers intended to employ for the project. Please indicate if your staff includes North American Board of Certified Energy Practitioners (NABCEP) certified technicians and provide name(s). You may describe additional qualifications of the project team you believe are applicable to this project.

Section 5: Marketing Strategy (5 points)

Section 5 shall include a description of marketing strategies the Installer has used in the past. Include descriptions of any experience staff may have with delivering presentations to a group or as part of a workshop, and their experience educating homeowners one-on-one.

Describe how you intend to market, and inform homeowners about, both solar PV purchasing and leasing/PPA options without bias.

Section 6: Use of Local Providers (10 points)

Provide documentation of Maryland and Frederick County-based employees, consultants, or subcontractors. Provide information about your Installer or your subcontractor's involvement with the Frederick County region, including professional or volunteer organization memberships and past work in the area.

Section 7: Scope of Services and Schedule (25 points)

Section 7 shall provide a detailed scope of service description addressing the requirements listed in the scope of work, as described above.

- A. Project Plan: Describe your plan for implementation, specifically, the Installer's ability to provide timely customer service, site assessments, rebate application submissions, installation services, and SREC aggregation. Please elaborate on the specific intake process for customer leads and the method for screening sites.
- B. Schedule: Include an estimate of the number of small-scale solar PV projects the Installer team can complete on a monthly basis (including permitting, inspection, and product availability) and what factors are accounted for in these estimates. Include an installation schedule for tiered levels of solar PV capacity. Begin the schedule with "Receipt of the names and contact information of participating property owners".

Assuming a minimum of 30 installations, provide a statement and/or timeline describing the firm's capability to complete the project within the desired time schedule. Describe how this project's demand and timeline will fit with existing and anticipated installations that are not part of the Solarize Frederick County initiative.

- C. Quality Control: Describe how the proposing firm will establish and maintain quality control throughout each project.
- D. System Specifications: Provide detailed information about the types and brands of systems the Installer plans to use for the Solarize project and why you have chosen those brands/manufacturers. Provide information about the minimum and maximum system size for solar hot water systems stated in terms of square feet of collector area and storage tank volume (in gal). Include details about the place of manufacture of major components, the manufacturer's equipment warranties, applicable labor and roof penetration warranties, as well as the system monitoring capability provided by the Installer or by equipment manufacturers. Include the OG-300 number and Solar Rating and Certification Corporation's (SRCC) rating in kWh/Yr (www.solar-rating.org/index.html).
- E. Maintenance and Repair: Provide information regarding ongoing maintenance and repair throughout the life of the system, including who the provider(s) will be and provisions for continuation if the provider

ceases operations.

- F. Outreach and Education: Describe how you will support the outreach portion of the Solarize Frederick County program. Note that educational Solarize 201 workshops will be held through the spring of 2013, and we request that contractors be available to describe the installation process and field questions.
- G. Permitting and Inspections: Installers are required to handle the acquisition, scheduling and implementation of all Frederick County permits and inspections as well as utility inspections. Describe the Installers experience handling permits and inspections.
- H. Customer Service: It is important that participants find the overall experience and process easy and stress-free. Please describe your Installer's customer service process. This should include a typical response time after receiving a lead, ongoing customer support, and process/policies for managing customer concerns, complaints and/or inquiries.
- I. Data Collection: For the 30 installations that receive the \$2,000/\$2,500 incentive grants, we are interested in suggestions for how and what data might be collected to build a dataset on the impact of these systems on energy production, carbon emission reduction and cost savings.

Section 8: Pricing Schedule (25 points)

Using Attachment A: Pricing Proposal, provide a proposed pricing schedule for solar water heating systems based on the number of units. It is anticipated that as the capacity of participation increases, the price per system will decrease, however, flat rate pricing or other creative options will be considered as well. Pricing based solely on individual system size will not be considered. If your Installer proposes different prices based on various equipment manufacturers, provide details. Itemize structural, access, roof, electrical, plumbing, or other conditions that would increase system costs for participants, and estimate additional costs per installation on per system basis.

Pricing must include all materials, equipment (manufacturer spec sheets), labor, transportation, permits, warranties (manufacturer or in-house), and services required to assess the proposed sites and design and install the systems in accordance with all applicable Maryland and Frederick County laws and codes. Additional services and features not stipulated by these requirements, such as extended warranties, maintenance contracts or ancillary monitoring equipment, may be listed and priced separately.

Pricing should be presented **before** any eligible Maryland or Solarize incentive grants or federal tax credits. Final pricing for the program will be determined once contractor selection is made. In the event that more than one contractor is selected to provide services, a single price will need to be negotiated between the selected Installers to provide uniformity in program marketing. The Installer should include any financing options that the Installer can make available to participants.

Section 9: Offer / Certifications / Offer Commitment (0 points)

The form on the following page of this Request for Proposal shall be completed and submitted with the proposal.

While your answer will not be factored into the evaluation process, please answer the following question:

If your company is not selected as the primary Solarize installer, but an additional installer is needed due to high demand, would your company like to be considered as a candidate for a second installer at negotiated rates based on the selected primary installer?

**Town of Myersville/Solarize Frederick County
CONFIDENTIALITY STATEMENT**

Proposal documents are generally considered to be a matter of public record. The Town of Myersville/Solarize Frederick County will endeavor to keep proprietary information confidential if the Installer marks the subject information as confidential, provided that the matters be withheld from the public are in such a manner as to leave no discretion on the issue.

OFFER / OFFER COMMITMENT

Installer Name:

We propose to complete the work requested in the Town of Myersville Request for Proposal for the Solarize Frederick County Project.

Installer acknowledges receipt of _____ (enter number) addenda for this RFP.

INSTALLER IDENTIFICATION

Business Name:

Address:

City/State/Zip:

Phone: FAX:

Primary Contact: Title:

Printed Name

The undersigned has the authority to commit the Installer to the proposal as identified in these documents and certifies that this information is true and accurate.

This organization is a _____ Corporation of the State of _____.
_____ Partnership
_____ Sole Proprietorship
_____ Other (specify) _____.

In witness whereof the undersigned has caused this instrument to be executed this day of _____, 2013.

By: _____

Printed Name _____

Signature: _____

Title: _____

WITNESS:

The undersigned attests that the person above is authorized as _____ of
_____ to commit the Installer to the proposal executed this _____ day of , 2013.

Attest: _____

Title: _____

Section 10: Supporting Documentation (10 Points)

Supporting Documentation must include the following supporting information, and may include additional supporting information or data that will support your bid as the best Installer for the project.

- A. Recent Financial Statement
- B. References: Include 3 references for residential installations. Include names, phone numbers, email addresses (if available), and photographs of systems if available.
- C. Sample Installer Contract

ATTACHMENT

- A. Solar Thermal Systems Pricing Proposal

Attachment A – Solarize Frederick County Solar Water Heating Pricing Proposal

Installer:		Contact Name:	
E-Mail:	Phone:	Date:	

Solar Hot Water System Equipment Description:

Make & Model	SRCC BTU/Day Rating	OG-300 Number	Number of People Served	Collector Area (sq. ft)	SRCC Rating (kWh/yr)

System Pricing	Up to a total of 10 systems of any size installed			10 to 30 systems of any size installed			30 or more systems of any size installed		
Number of People Served:	<u>E.g. 2</u>	<u>E.g. 2-4</u>	<u>E.g. 4+</u>	<u>E.g. 2</u>	<u>E.g. 2-4</u>	<u>E.g. 4+</u>	<u>E.g. 2</u>	<u>E.g. 2-4</u>	<u>E.g. 4+</u>
Hardware Package									
Labor									
Total									
\$ per kWh annually (divide total by SRCC rating)									

Additional Cost Factors (if any)	
2 Story House	
Roofing (non asphalt)	
Accessibility of Project	
Monitoring	
Extended Warranty	
Maintenance Contract	
Other 1:	
Other 2:	
Other 3:	